

(19) World Intellectual Property
Organization
International Bureau



(43) International Publication Date
8 January 2004 (08.01.2004)

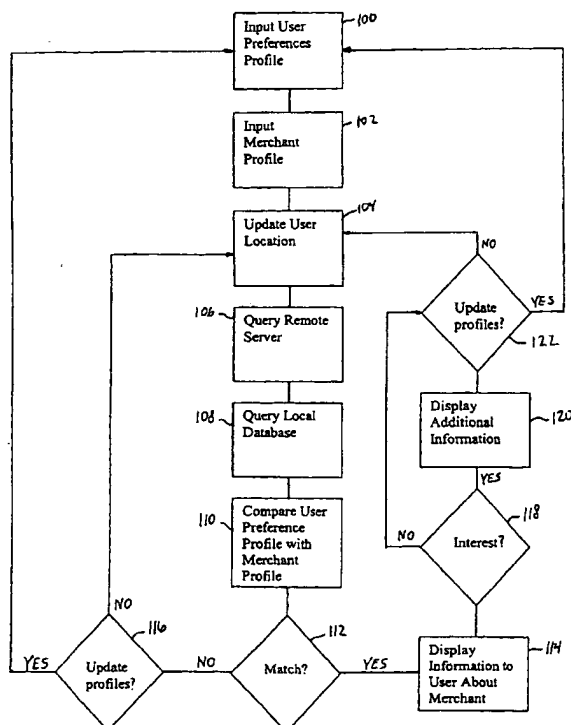
PCT

(10) International Publication Number
WO 2004/003705 A2

- (51) International Patent Classification⁷: **G06F** (74) Agent: SHAFTAL, Max; Patzik, Frank & Samotny, Ltd., 150 South Wacker Drive, Suite 900, Chicago, IL 60606 (US).
- (21) International Application Number: PCT/US2003/020655
- (22) International Filing Date: 27 June 2003 (27.06.2003) (81) Designated States (*national*): AE, AG, AI, AM, AT, AU, AZ, BA, BB, BG, BR, BY, BZ, CA, CH, CN, CO, CR, CU, CZ, DE, DK, DM, DZ, EC, EE, ES, FI, GB, GD, GE, GH, GM, HR, HU, ID, IL, IN, IS, JP, KE, KG, KP, KR, KZ, LC, LK, LR, LS, LT, LU, LV, MA, MD, MG, MK, MN, MW, MX, MZ, NO, NZ, OM, PH, PL, PT, RO, RU, SC, SD, SE, SG, SK, SL, TJ, TM, TN, TR, TT, TZ, UA, UG, US, UZ, VC, VN, YU, ZA, ZM, ZW.
- (25) Filing Language: English
- (26) Publication Language: English
- (30) Priority Data: 60/391,982 27 June 2002 (27.06.2002) US
- (71) Applicant (*for all designated States except US*): SMALL WORLD PRODUCTIONS, INC. [US/US]; 7777 Lake Street #107, River Forest, IL 60305 (US).
- (72) Inventor; and
- (75) Inventor/Applicant (*for US only*): BRADY, James, V., Jr. [US/US]; 317 Franklin Avenue, River Forest, IL 60305 (US).
- (84) Designated States (*regional*): ARIPO patent (GH, GM, KE, LS, MW, MZ, SD, SL, SZ, TZ, UG, ZM, ZW), Eurasian patent (AM, AZ, BY, KG, KZ, MD, RU, TJ, TM), European patent (AT, BE, BG, CH, CY, CZ, DE, DK, EE, ES, FI, FR, GB, GR, HU, IE, IT, LU, MC, NL, PT, RO, SE, SI, SK, TR), OAPI patent (BF, BJ, CF, CG, CI, CM, GA, GN, GQ, GW, ML, MR, NE, SN, TD, TG).

[Continued on next page]

(54) Title: SYSTEM AND METHOD FOR LOCATING AND NOTIFYING A USER OF A PERSON, PLACE OR THING HAVING ATTRIBUTES MATCHING THE USER'S STATED PREFERENCES



(57) Abstract: A location-based and preference-based system (10) and method for matching the profiles of the attributes and/or characteristics of persons, places and/or things with the expressed preferences of mobile users such as travelers, to alert and direct such users to any places having attributes matching the user's express preferences. In particular, the system comprises a mobile device (20) such as a GPS-capable PDA that stores the user's preferences and communicates with a server (23) that contains or accesses the profiles of the persons, places or things to compare the profiles and preferences. Comparison of the user's preferences with the various profiles allows the user only to be informed of those persons, places and/or things that it is likely to be interested in. The system (10) and method thus provides for a mobile real-time point of interest exchange network.

WO 2004/003705 A2



Published:

— without international search report and to be republished
upon receipt of that report

For two-letter codes and other abbreviations, refer to the "Guidance Notes on Codes and Abbreviations" appearing at the beginning of each regular issue of the PCT Gazette.

5

10 **SYSTEM AND METHOD FOR LOCATING AND NOTIFYING
A USER OF A PERSON, PLACE OR THING HAVING
ATTRIBUTES MATCHING THE USER'S STATED PREFERENCES**

 This application claims priority based upon U.S. Provisional Patent
Application Serial No. 60/391,982 filed June 27, 2002.

15

TECHNICAL FIELD

 The present invention relates generally to the field of communications
systems and, in particular, to a system and method for a location-based and
preference-based system for matching the dual preferences of subscribing
merchants, managers or other entities with mobile travelers or the like to alert
20 and/or direct such travelers to any locations, persons, businesses or
attractions within a desired proximity, and still more particular, to a mobile
real-time point of interest exchange network, and still yet more particularly, to
a system and method using an interactive wireless mobile device to match the
preference of travelers with subscribing merchants and the like.

25

BACKGROUND OF THE INVENTION

 A global positioning system of satellites ("GPS") enables the tracking of
objects on the surface of the earth through the use of satellites and receivers.
In particular, the orbiting satellites of the GPS system each contain

transmitters that send out radio frequency signals. GPS uses a pseudo-random data stream encoded on each satellite's carrier frequency. The receiver is synchronized with the data stream by matching an identical pseudo-random data stream with the data stream received from the satellite
5 to give the distance to that satellite at the speed of light that the radio signal traveled. The receiver then triangulates its position using three or more satellites and by knowing where the satellites are by way of their particular data.

Stated another way, a GPS receiver receives tracking information from
10 various GPS satellites via a GPS antenna. That information is transmitted in digital form from the receiver to a microprocessor that then makes the foregoing calculations. The information includes longitude, latitude, heading, velocity, time and elevation. The data can be processed and formatted as a data packet and immediately displayed, transmitted or stored in EEPROM
15 until requested. Such GPS location-based information has enabled persons or vehicles equipped with GPS devices to be located, to locate their own positions, and/or to locate the best navigational paths to their destination with a great deal of accuracy.

Moreover, pursuant to recent federal emergency 911 legislation,
20 cellular service providers must employ technology capable of locating the cellular phone within a certain distance range. This legislation was triggered by the fact that oftentimes when 911 calls were placed from a cellular phone moving away from the site of an emergency, by the time that the position of the caller was estimated using the then current technology, and by the time
25 that the emergency vehicles were dispatched in response thereto, the caller

may have traveled a significant distance from the site of the emergency.

Hence, valuable time was often lost by the emergency vehicles in attempting to locate the parties in need of assistance. The ubiquitous nature of such technology enabling the determination of the accurate geographic location of a mobile user has made it feasible to provide location-based information to the mobile user while the user is literally in transit.

While other systems have attempted to use such GPS position information to provide location-based information, such as advertisements or coupons for local businesses, one shortcoming with the current systems is that they provide information or offers that are only of a general interest. Accordingly, they often target a large number of people with the hopes that a certain percentage of the recipients will favorably respond, as opposed to serving the particular, more exacting preferences of a specific recipient. An example of such general public messages is a broadcast message, or a wireless E-mail message or a cellular call to anyone within a certain geographical radius of a fast-food merchant that offers a reduced price offer for a limited time. Such general interest, location-based messages run the significant risk of annoying a recipient that is not interested in the offer. As a result, the message may either be ignored by the recipient or serve to create a negative opinion about the merchant with respect to future purchasing decisions. Use of such general messages may also serve to create a negative opinion about the service provider as well. Likewise, other location-based information providers such as Vindigo and Go2 function much like mobile "Yellow Page" directories in response to specific requests for particular types of business in a certain locality by the traveler. However, such services

are typically only provided on a traveler-initiated basis prompted by a specific request.

Other services like On-Star® provide location-based information in response to traveler-initiated requests related to roadside assistance, security
5 or other such traveler support services. Other systems such as Lojac® have monitored or tracked the movement of specific assets such as vehicles – and reported the location of the vehicle to the police or owner when stolen. However, none of these location-based information providers are believed to specifically tailor such attribute-based and location-based information to the
10 specific expressed profile or preferences of the mobile traveler that will receive such information.

Other systems have sought to use purchasing interest profiles of the user. For example, the system for providing navigational services of Lee et al., U.S. Patent No. 6,374,177 contains user profile databases, billing
15 information and a purchasing interest profile. Accordingly, information in advertising databases can be compared against a user's purchasing interest profile through an adaptive profiler, so that advertisements inserted into personalized digital broadcasts mesh with that user's past buying history. Likewise, the prior system of Adaptive Personalization provided an adaptive
20 recommendation engine that analyzed the information that individual users accessed on the mobile devices. Based on the accessed information, the recommendation engine prioritized information for mobile applications provided to that user. A significant problem with these systems is that they rely at most on an inferred or extrapolated preference of the user based on

prior behavior or patterns of behavior, rather than explicitly asking the user for preferences. Accordingly, such systems do not address situations wherein the preferences of the user change or where the user has not previously been interested in a particular service or good.

5 These systems also do not provide a system that is both location-based and preference-based to provide information to a mobile user or consumer by matching the preferences of the person, place or thing (e.g., a merchant) and the user, so as to target a user based on a stated, rather than interpreted, preference. Furthermore, these systems do not allow the
10 merchant or other entity to reach users at a time and place when they are most likely to purchase its goods and/or services.

 Therefore, there is a need to produce and offer a dual-preference matching system and method that provides a system that is both location-based and preference-based to facilitate the matching up of merchants and
15 users or consumers, while being easy and economical to manufacture and use.

DISCLOSURE OF INVENTION

 The present invention is an improvement over conventional location-based information systems in that the system and method for providing a
20 location-based and preference-based system that matches the specific expressed interests and preferences of a user with the profile of a person, place or thing is unique and an improvement over the prior art. In particular, the present invention enables the user to enter and update its preference information for a wide variety of goods, services and interests to allow the
25 user to be notified of only those persons, places and things that expressly

match up with the user's stated preferences. In operation, a user will create a preference portfolio for various types of persons, places and/or things preferably through the use of a wireless device that has GPS capabilities.

The preferences may include additional information such as: a distance range
5 from the user, price, period of interest and the like. Persons, places and things may likewise create their own profiles on the system to list their goods, services, attractions and the like. Additionally, the information that is provided to the users may include information on a variety of events such as, but not limited to, concerts, sporting events, special appearances, exhibitions,
10 demonstrations and the like. The system of the present invention thereafter accesses and reads the profiles of the persons, places and things to compare the user's preferences on the wireless device. If any of the persons, places or things match-up with the expressed preferences of the user, then the user will be notified of those persons, places and things. The user may thereafter, if
15 interested, request additional information about the person, place and/or thing such as, but not limited to directions from the user's current location.

It is therefore an object of the present invention to provide a new and improved matching system and method that connects mobile users with their expressed favorite or desired types of people, places and/or things as they
20 travel.

It is another object of the present invention to provide a new and improved matching system and method that uses the exact, stated preferences of the users to allow information to be specifically targeted to users who are the most likely interested in the information.

It is yet another object of the present invention to provide a new and improved matching system and method that allows mobile users to use the system by way of multiple platforms.

It is still yet another object of the present invention to provide a new
5 and improved matching system and method that is capable of working with real-time GPS location-based systems as well as pre-loaded mapping software.

Yet another object of the present invention is to provide a new and improved matching system and method that is capable of using a variety of
10 communications media.

It is another object of the present invention to provide a new and improved matching system and method that generates revenue to the service provider.

Other objects, features and advantages of the invention will be
15 apparent from the following detailed disclosure, taken in conjunction with the accompanying sheets of drawings, wherein like reference numerals refer to like parts.

BRIEF DESCRIPTION OF THE DRAWINGS

FIG 1. is a block diagram illustrating an embodiment of the invention
20 showing a PDA connected to a GPS system, and a server through the Internet for accessing a database of profiles.

FIG. 2 is a schematic view of one embodiment of a PDA of the present invention.

FIG. 3 is an example of a user preference profile for restaurants.

FIG. 4A is an example of a user preference profile including, among other things, antique items that the user is interested in.

FIG. 4B is an example of a merchant profile listing the types of
5 products that the merchant offers for sale.

FIG. 5 is an example of a user real estate preference profile.

FIG. 6 is a flow chart diagram of the steps involved in matching the preferences of a user with a merchant's profile for one embodiment of the present invention.

10 FIG. 7 is an example of one embodiment of screen display of a PDA showing information of a merchant that matched the user's preferences.

FIG. 8 is a flow chart diagram of the technical steps involved in matching the preferences of a user with a merchant's profile for one embodiment of the present invention.

15 FIG. 9 is a flow chart diagram of the steps involved in matching the preferences of a user using a stand-alone remote device with a merchant's profile for one embodiment of the present invention.

FIG. 10 is a flow chart diagram of the steps involved in matching the preferences of a user using a mobile device that does not have a constant link
20 or "pulse" to a network with a merchant's profile for one embodiment of the present invention.

DETAILED DESCRIPTION OF THE INVENTION

While this invention is susceptible of embodiment in many different forms, there is shown in the drawings and will herein be described in detail several specific embodiments, with the understanding that the present disclosure is to be considered merely an exemplification of the principles of the invention and the application is limited only to the appended claims.

Referring now to the drawings, and particularly to FIG. 1, there is shown a preferred embodiment of the hardware components needed for the preference matching system of the present invention. The preference matching system, generally designated by the number 10, is shown as having a personal digital assistant ("PDA") 20, a remote server 23 containing or capable of accessing a database of merchant profiles 25; and a GPS base station and antennae/satellite dish 24 for communicating with the GPS satellites (not shown). It is appreciated that the wireless device of the present invention may communicate and receive location-based information from the GPS satellites in any known way. While the profiles 25 are generically described as merchant profiles, it is appreciated that the profile may be for any entity that is interested in providing information to a user. Examples of such entities include, but are not limited to, merchants, operators, property owners, real estate brokers, managers, park district managers, individuals, and rangers. Additionally, the information that is provided to the users may include information on a variety of events such as, but not limited to, concerts, sporting events, special appearances, exhibitions, demonstrations and the like.

Examples of a PDA are a Pocket PC® Microsoft Windows CE® operating system based PDA, a Palm®, Handspring®, Sony®, other Palm® Operating System based PDA, or other handheld devices capable of receiving digital information such as the Linux® Operating System based Sharp® Zaurus. While a PDA is shown and disclosed, it is appreciated that the wireless device may be any of the known wireless devices including, but not limited to, a wireless-enabled notebook computer, a 2-way pager, a cellular phone, or an integrated vehicular navigational device. The PDA preferably has a local database 21 stored in on-board RAM or ROM such as memory cards so as to contain the preferences of the user and/or the profiles of the merchants or other points of interest along a selected route or within a specified vicinity of the user. It is also appreciated that the user preferences may be stored on the server or elsewhere and not depart from the scope of the present invention. The PDA also preferably has GPS capabilities so as to be capable of determining its geographic position by receiving and interpreting the signals of the GPS satellites. It is appreciated that the PDA may contain or work in cooperation with a GPS receiver component 22.

It is appreciated that the server 23 may be capable of being accessed wirelessly through a wireless connection (25); by non-wireless connection by way of conventional modem by the PDA via telephone line and ISP to the Internet 26; or by a land-line connection to a computer 27 with TCP/IP access to the Internet 26. A router 27A and firewall 28 are preferably interposed between the Internet and the server for security purposes. It is appreciated that other security measures and devices may be used and not depart from the scope of the present invention. A server farm is preferably used for the

proprietary socket server (both clustered and redundant), as well as for web serving the application's user interface (both clustered and redundant).

While it is appreciated that a wide variety of software may be used, the preferred software is: portable GPS receiving software such as NMEA 0183
5 Protocol supported software; a profile matching application; Berkeley/Winsock socket server software for both the wireless device and the non-wireless device embodiments; TCP/IP access software; COM/DCOM or J2EE Compliant web server software; and an ANSI/ISO SQL database management system such as an SQL server 2000 or an Oracle® 9i database
10 management system. The server farms for the socket server preferably run Windows® 2000 Advanced Server or better and Linux® or Solaris with J2EE web application software.

Referring now to FIG. 2, the preferred hardware for a PDA for use in the present invention is shown. The PDA preferably includes: a control unit
15 including a CPU 51; an input/output system (I/O system) 52A and 52B controlled by the CPU 51; a location determination system such as a GPS receiver 53 and associated software; on-board memory 54 for data storage; a cellular receiver and transmitter 55; a wireless modem 56 or hardwired modem (not shown) for accessing the Internet; and a map collection reader
20 57 that can be in CD or DVD form or some other suitable readable storage media. The I/O system of the PDA preferably includes an input device 52A and a display 52B such as an LCD screen to interface between the user and the PDA. The input device 52A may be, but is not limited to, a touch pad, an on-screen keyboard, a touch screen, a mouse, or a speech recognition

device. The board memory 54 for storing the personalized information of the user and/or the profiles of the merchants and points of interests may be, but is not limited to, EPROM, flash memory, disk drive, or other suitable recordable storage media.

5 If a wireless TCP/IP or similar connection is available for the PDA, the PDA can download the requisite user preference profile and/or person, place or thing (heretofore, generically referred to as a merchant) profile information in real time from the remote server. If a connection is not available, then the requisite user profile and/or merchant profile information can be preloaded or
10 downloaded into the Local Database or a separate database of the PDA at a time when such a connection is available.

 Merchant information may include, but is not limited to: the type of business or location; the price ranges of the products and/or services that it provides; the hours of operation; the types of users it is most interested in
15 reaching; its location; and a description of the products and services provided. Additionally, it is appreciated that the merchant may also include keywords that detail or describe specific products, services or features that the merchant offers. In the preferred embodiment, it is appreciated that the merchant may purchase such keywords from the system operator in order to
20 enhance its listing.

 The system and method of the present invention thereby allows users to indicate their preferences with respect to such information as, but not limited to: the type of merchant, goods, services and the like they are interested in. Additionally, the users may also include specific parameters to

limit the amount of information received. Examples of parameters that may be used include, but are not limited to, the time periods during which the users are interested in such merchant (e.g., only on weekends or only at night); the price ranges that the users are willing to spend; specific type of products, services, attractions or the like that the merchant has to offer; and the maximum distance that the user is willing to travel. It is appreciated that users and merchants may enter their preferences into the system in any known way, including but not limited to, using a series of hierarchical menus on the internet, the PDA, or the like, that have a plurality of possible preference selections for a variety of topical categories. While it is appreciated that the geographic location of the merchant may be calculated in any number of ways, it is preferred that a mapping service will calculate the longitude and latitude of an address that is inputted by the merchant.

Referring to FIG. 3, an example of a user preference profile for food is shown. It is appreciated that the example of the user profile shown and disclosed is merely one example of the type of information that may be entered or contained in a user profile and that the present invention is not limited to any one embodiment. As seen in FIG. 3, the user has indicated that he likes Mexican food, but only on the weekends and places that are within 10 miles of his location. Additionally, the user has indicated that he prefers restaurants where the entrees are not more than \$10-\$12 each and where the restaurant offers chimichangas. Accordingly, the system and method will compare the preferences with the merchant profiles and only send messages to the user from merchants that meet those preferences. The system and method thereby provide for a targeted advertising system that permits, on one

hand, merchants to target those users who are the most likely to purchase their goods and/or services and users, on the other hand, to only receive information that is related to their interests or preferences. By allowing the users to select or input specific items or details about their preferences and
5 interests, the present invention will allow the users to be able to select places that are of the most interest to them. Additionally, the system will provide merchants who meet the user's stated preferences even if the user would not normally consider that restaurant (e.g., Bob's Diner may also offer chimichangas for \$7.99).

10 Referring to FIGS. 4A and 4B, an example of a user preference profile and a corresponding merchant profile are shown. FIG. 4A shows a user preference profile for a user named Bill that lists a number of activities, interests and preferences that he is interested in. Particularly, the user has indicated that he is interested in hanggliding at any time within a twenty mile
15 radius of his location; antique glass at any time within a five mile radius; golf between the hours of 6 a.m. and 8 p.m. and within a seven mile radius; German food between 6 p.m. and 8 p.m. that is within a ten mile radius; and the outdoor symphony at any time within a fifteen mile radius. The user has also indicated that he is interested in skiing and bowling, but has currently
20 turned off those preferences so he will not get any offers or messages related to those services. It is appreciated that the user may repeatedly modify the user's preference profile at any time. Accordingly, in the example shown in FIG. 4A, the user may turn off the preference profile hanggliding in the winter and activate the preference profile for skiing. Referring to FIG. 4B, a
25 merchant profile for Alice's Attic is shown. The proprietor of Alice's Attic has

indicated that she sells antique dolls, antique porcelain, antique glass and antique tapestry. Accordingly, if Bill passes within five miles of Alice's Attic, the system will match up Bill's preference for antique glass with Alice's Attic's products and notify Bill that Alice's Attic sells antique glass. Bill may then
5 select the direction option to obtain directions and follow the provided route to the store.

It is also appreciated that the present system may work with real estate. In particular, it is appreciated that homeowners, real estate brokers and the like may list homes on the system, whereby when the listed homes
10 match the preferences of the user, the user will be notified of the home to allow it to drive by and look at. For example, a user may enter preferences related to the type and location of houses that it is interested in. Referring to FIG. 5, an example of the preferences of a user is shown. The user has indicated that it is looking for a house having at least three bedrooms, two
15 bath, is priced between \$200,000 and \$250,000 and is within 10 miles of a train station. As the user travels, it will accordingly be notified of any homes listed on the system that meet its preference criteria. Additionally, it is appreciated that the user may also interact with the system to determine the average real estate prices for a particular type of housing or building in the
20 area in which the user is traveling.

Referring to the FIG. 6, the preferred steps in matching the preferences of a user with those of a merchant are shown. After the user and merchant enter their preferences and profiles in steps 100 and 102, the GPS receiver
22 calculates the user's current position in step 104. The remote server 23 is
25 then queried as to the locations and characteristics of the listed merchants

and/or places of interest in step 106, while the local database 21 is queried with respect to the stated preferences of the user in steps 108. The software then compares the coordinates of the current location of the user, the preferences of the user and the profiles of the merchants to determine if there is a match in step 110. While various methods may be used, the "Great Circle" equation is one example of a method for determining the distance between the place and the user, based on the distance between two points on a sphere. If the merchant matches the preference of the user in step 112, and the merchant is within the distance range selected by the user, then the user is notified of the merchant in step 114. Otherwise the user may elect to update its user preference profile in step 116, wherein the process would be repeating starting in step 100. Otherwise, the system will continue to monitor the user location in step 104 and continue the matching process.

Referring again to step 114, notification of the merchant may include information pertaining to the merchant's business, products and/or services, as well as directions to the merchant. If the user indicated its interested in the merchant in step 118, the user may request more information, if desired or necessary, in step 120. The user may then elect to update its user preference profile in steps 122, wherein the process will be repeated starting in step 100. It is appreciated that the merchant profile may also be updated by the merchant at any time. Otherwise, the process restarts in step 104.

FIG. 7 illustrates one example of a screen display for the PDA of a match found by the system. In the preferred embodiment, when a match is found, the PDA 20 will display various information about the place that matches the user information. Examples of the information that may be

displayed in various data fields or the like include, but are not limited to, the name of the merchant 150, the hours of operation 152, the street address 154, the current distance 156 from the user, the phone number 158, an image 160 of the merchant, a tagline 162 and any keywords 164. For example,

5 referring back to the user preferences inputted for Bill in FIG. 3, information pertaining to a Mexican restaurant matching Bill's stated preferences is shown. The restaurant, Café Mexicana, is shown as being 4.6 miles away with meals that range from \$8 to \$12. Additionally, the keywords section 164, in addition to indicating that it has an outdoor patio, indicates that the

10 merchant also offers chimichangas. It is also appreciated that the screen display may include buttons or information 166 pertaining to ratings, reviews, seals of membership, certificates and the like, or a button 168 that allows the user to communicate with the merchant, among other things, make inquiries or reservations. The seals of membership and certificates may be used to

15 provide a mechanism to allow the users to feel more confident to visit the merchants that match their preferences. The screen display may also include directions to the place and/or a map 170 that shows the current location of the user and the merchant's location. Clicking on the map may provide the user with specific directions based on the user's current location as calculated by

20 the GPS system. While the screen display includes the above-identified information organized in a particular way, it is appreciated that the system may produce screen displays having different or additional information that may be organized in any number of ways and not depart from the scope of the present invention.

Referring to FIG. 8, a flow diagram showing the preferred technical steps in one embodiment of the present invention. In operation, a GPS device provides position data in the form of NMEA 0183 sentences. Software programs may be used as averaging programs to collect and average multiple

5 GPS Latitude/Longitude readings in an effort to produce an accurate location, as well as altitude, direction and speed. Such programs may also display satellite position, elevation, angle, signal level and most everything else that is available from the NMEA sentences. The NMEA 0183 sentences are preferably accessed from the GPS device and parsed into a useable data

10 structure in steps 200 and 202. If it is determined in step 204 that a wireless TCP/IP connection to the Internet or a network associated with the remote server is used, then an open secured socket is established in step 206. The parsed NMEA data structure may then be sent to the server in step 208, whereby the user's profile may be accessed from the remote server database

15 of profiles in step 210. The server database of profiles may then be queried for merchant locations matching the specified user profile and distance limits in step 212.

On the other hand, if a suitable TCP/IP connection to the Internet of a network associated with the remote server is not available, then the user's

20 profile is accessed from the local database of the PDA in step 214 for merchants matching the specified user profile and distance limits. Accordingly, the matching in this case will occur based on preloaded user and merchant profile information contained in the local database of the PDA as opposed to the matching process taking place on the remote server.

Depending on where the information is stored, either the local database or the remote server database will then be queried in step 216 as to whether the merchant is of the type preferred by the user. In particular, the database may be queried as to whether any merchant is within the specified

5 distance limit of the user profile; and whether any merchant profile and/or keywords match the user's preference profile. If it is determined that the merchant is of the type preferred by the user, and it is determined in step 218 that the matching process is operating on the remote server, then the results are sent back to the client in step 220. Thereafter, the socket is closed in step

10 222, and the results are displayed on the PDA to the user in step 224. If, on the other hand, the matching process is not running on the server, but instead is running locally at the PDA, then the results are displayed to the user at the PDA in step 224.

If the user indicates any interest in the displayed place in step 226,

15 then additional merchant information such as its relative location may be transmitted and/or displayed to the user. For example, directions to the merchant location from the user's position may be provided and/or additional information such as, but not limited to, hours of operation or sales may be provided. If no interest is shown in step 226, then the process restarts in step

20 200, preferably after a one second threaded pause. It is appreciated that the user and/or merchant may also preferably update their preference profiles at any time.

Revenue may be generated in a number of ways from the present invention. Merchants can be allowed to list themselves for free in the system

25 in the appropriate categories of businesses, products, services, attractions,

- places and the like. While it is preferred that the merchants may list themselves for free, it is also appreciated that they may pay for their initial listings as well. In addition to the initial listing, the merchants may also enhance their listing by purchasing "keywords" that may increase the chances
- 5 that passing travelers using the system will be notified of the location of the merchant because of a match between the user's preference and the merchant's profile and/or keywords. Cellular phone service and other wireless service providers may also be licensed or charged to allow for the system of the present invention to be available to their subscribers.
- 10 Furthermore, publishing companies such as newspapers and phone directory publishers who normally sell ad space can receive a commission based on the revenue generated from the sale of keywords to operators or managers of the places that list their attributes in the form of their profile.

- It is also appreciated that chains of business may also be able to offer
- 15 their members the benefit of a lower fee. Entities such as governmental agencies or tourism boards could also be charged for expanded information on particular places so as to encourage increased numbers of visits to such places by travelers. It is further appreciated that the places may remit a percentage of all sales from the matching system to the operator of the
- 20 system of the present invention.

- It is appreciated that the system may work with both real-time GPS location-based systems, and pre-loaded mapping software such as DVD-based "in-dash" navigational systems available on many high-end automobiles. While GPS positioning is described herein as an example of
- 25 one possible method for determining the location of the user, other forms of

locating systems and method such as through triangulation using the distance between radio towers should also be considered as being within the scope of the present invention. Furthermore, it is appreciated that the system may work with remote units without GPS and no wireless connection that maintain
5 a live cellular or a data network link (e.g., a Blackberry).

Referring to FIG. 9, the preferred steps in matching users and merchants is shown in connection of a stand-alone remote device (i.e., no GPS and no wireless connection). In step 300, the user may input its preferences into the device. The merchant database is downloaded as
10 described above, either filtered through preferences at the time of the download or filtered through preference files downloaded onto the device in step 302. During operation, the user indicates in step 304 where it is on the map displayed by a map reader in any of the known ways including, but not limited to: tapping a touch screen or typing in an address and/or coordinates.
15 The preference data that has been downloaded and/or inputted onto the stand-alone remote device will then be compared in step 306. If the device determines that there are merchants that match the user's preferences in step 308, then the device will display those merchants to the user in step 310. If the user indicates it is interested in the merchant in step 312, the user may
20 then elect to receive more information about the merchant in step 314. If the user does not desire more information, the system may then be restarted in either step 300 or 304 depending on whether the user elects to update the user information in step 316. Similarly, if the merchant does not match the user preferences in step 308, the system may be restarted in either step 300
25 or 304 depending on whether the user elects to update its preferences in step

318. It is appreciated that the step of downloading the merchant profile database may be repeated as desired to update information regarding the merchants. Additionally, it is also appreciated that the user may select specific pre-determined information to be downloaded into the device. For example, if
5 the user is intending to travel to Baltimore and would like to have information on site-seeing tours in Washington, D.C., as well as restaurants in the Baltimore area, the user may input that information into the system. The system then may calculate the location of the user either through GPS systems or through software that calculates that longitude and latitude
10 coordinates of the user and merchant that meet the preferences in the destination area through known geo-coding technology.

FIG. 10 shows the preferred steps in matching users using a mobile device that does not have a constant link or "pulse" to a network. Examples of such devices include, but are not limited to a Blackberry®, Palm® 705i,
15 pager or cell phone (the "on-line" remote device). In order to start, the user inputs its preferences in step 400. The merchant profile database may then be accessed or downloaded in step 402. In order to assure that the system only matches those merchants that are within the prescribed distance limit from the user, the on-line device preferably constantly sends its current
20 coordinates to the server in step 404. The databases containing all of the user preferences and merchant profiles may be either loaded onto the on-line device or may be run on the server in step 406. If the databases are run on the server, the server will thereby reduce its contact or messages with the on-line device to sending only hits or matches between the user preferences and
25 the merchants. In operation, depending on whether the user's preference

profile is stored on the server or on the on-line device, the user's preference profile will be accessed in either step 408 or step 412. Thereafter, the user's preferences will be compared with the information stored about the merchants to determine matches in step 410. It is appreciated that the matching process
5 may be accomplished using the same algorithm as in the stand-alone device embodiment. Alternatively, the on-line remote device can carry the user's preferences (without having to download the location profiles and store them on its local database) and send the data back to the server to allow the matching to take place along with the GPS location check.

10 If it is determined that the place is of the type preferred by the user, and it is determined in step 414 that the matching process is operating on the remote server, then the results are sent back to the client in step 416. Thereafter, the results are displayed on the mobile device to the user in step 418. If, on the other hand, the matching process is not running on the server,
15 but instead is running locally at the wireless device, then the results are displayed to the user at the wireless device in step 418.

If the user indicates any interest in the displayed place in step 420, then additional merchant information such as its relative location may be transmitted and/or displayed to the user in step 422. For example, directions
20 to the merchant location from the user's position may be provided and/or additional information such as, but not limited to, hours of operation or sales may be provided. If no interest is shown in step 420, then the process restarts in step 400, preferably after a one second threaded pause. It is appreciated that the user and/or merchant may also preferably update their

preference profiles at any time, or if the user elects not to update its user profile, it may skip step 400 and proceed to step 404.

It will be understood that modifications and variations may be effected without departing from the scope of the novel concepts of the present invention, but it is understood that this application is limited only by the scope of the appended claims.

**SYSTEM AND METHOD FOR LOCATING AND NOTIFYING
A USER OF A PERSON, PLACE OR THING HAVING
ATTRIBUTES MATCHING THE USER'S STATED PREFERENCES**

CLAIMS

- 5 1. A method of notifying a user using a device (20) about people, places and things having attributes that match the preferences of the user and are within a desired proximity to the user's location, the method comprising the steps of:
- creating (100, 300, 400) a user preference profile, wherein the user
- 10 preference profile is created by the user;
- storing the user preference profile;
- creating (102, 302, 402) a profile of at least one of the people, places and things;
- storing the at least one of the people, places and things profile;
- 15 determining (104, 304, 404) the location of the user;
- comparing (110, 306, 410) the user preference profile and the at least one of the people, places and things profile to determine if the at least one of the people, places and things has attributes that match the preferences of the user, wherein the step (110, 306, 410) of comparing the user preference
- 20 profile with the at least one of the people, places and things profile comprises the step of determining whether the at least one of the people, places and things is within a distance that is specified by the user in the user preference profile; and
- notifying (114, 310, 418) the user of the at least one of the people,
- 25 places and things that match the user's preferences.

2. The method of Claim 1, which further comprises the step (120, 314, 422) of providing additional information, if requested by the user, about the at least one of the people, places and things that match the user preference profile.
- 5 3. The method of Claim 2, wherein the additional information comprises driving instructions to the at least one of the people, places and things.
4. The method of Claim 1 wherein the device (20) is a wireless device.
- 10 5. The method of Claim 4 wherein the device (20) is a PDA.
6. The method of Claim 4 wherein the device (20) is a cellular telephone.
7. The method of Claim 1 wherein the profile of the at least one of the people, places and things includes keywords.
- 15 8. The method of Claim 1 wherein the step (100, 300, 400) of inputting the user preferences comprises selecting the preferences from a series of hierarchical menus.
9. The method of Claim 1 wherein the people, places and things comprise real estate.
- 20 10. The method of Claim 1, which further comprises the step (116, 122, 316, 318, 400) of updating, if necessary, the user preference profile.
11. The method of Claim 1 wherein the step (104, 304, 404) of determining the location of the user comprises the step of using pre-loaded mapping software.

12. The method of Claim 1, wherein the step (104, 304, 404) of determining the location of the user comprises using a GPS location-based system (22,24).

13. The method of Claim 1, which further comprises the step of
5 providing means for the user to communicate with the at least one of the people, places and things.

14. The method of Claim 1 wherein the device (20) is a stand-alone device.

15. The method of Claim 14, which further comprises the step of
10 downloading the profiles of the at least one of the people, places and things.

16. A location-based and preference-based matching system (10) for notifying a user about people, places and things having attributes that match the preferences of the user and are within a desired proximity to the user's location, the system comprising:

15 a device (20) comprising output means (52B):

input means (52A) for the user to input the user preferences;

means (22, 24) for determining the location of the user;

input means (26,27) for creating a profile for the people, place and things;

20 storage means (21, 25, 54) for storing the user preferences and the profiles of the people, places and things;

means (23) for comparing the user preferences and the profiles of the people, places and things to determine whether there are any matches;

means for displaying information about the matches, if any, on the
25 output means (52B).

17. The system (10) of Claim 16 wherein the device (20) is a wireless device.

18. The system (10) of Claim 17 wherein the wireless device (20) is a PDA.

5 19. The system (10) of Claim 17 wherein the device (20) is a cellular phone.

20. The system (10) of Claim 16 wherein the means to determine the location of the user comprises pre-loaded mapping software.

21. The system (10) of Claim 16 wherein the means to determine
10 the location of the user comprises a GPS location-based system (22, 24).

22. The system (10) of Claim 16 wherein the input means comprises a series of hierarchical menus.

23. The system (10) of Claim 16, which further comprises means to provide directions from the location of the user to the people, places and
15 things that match the user preference profile.

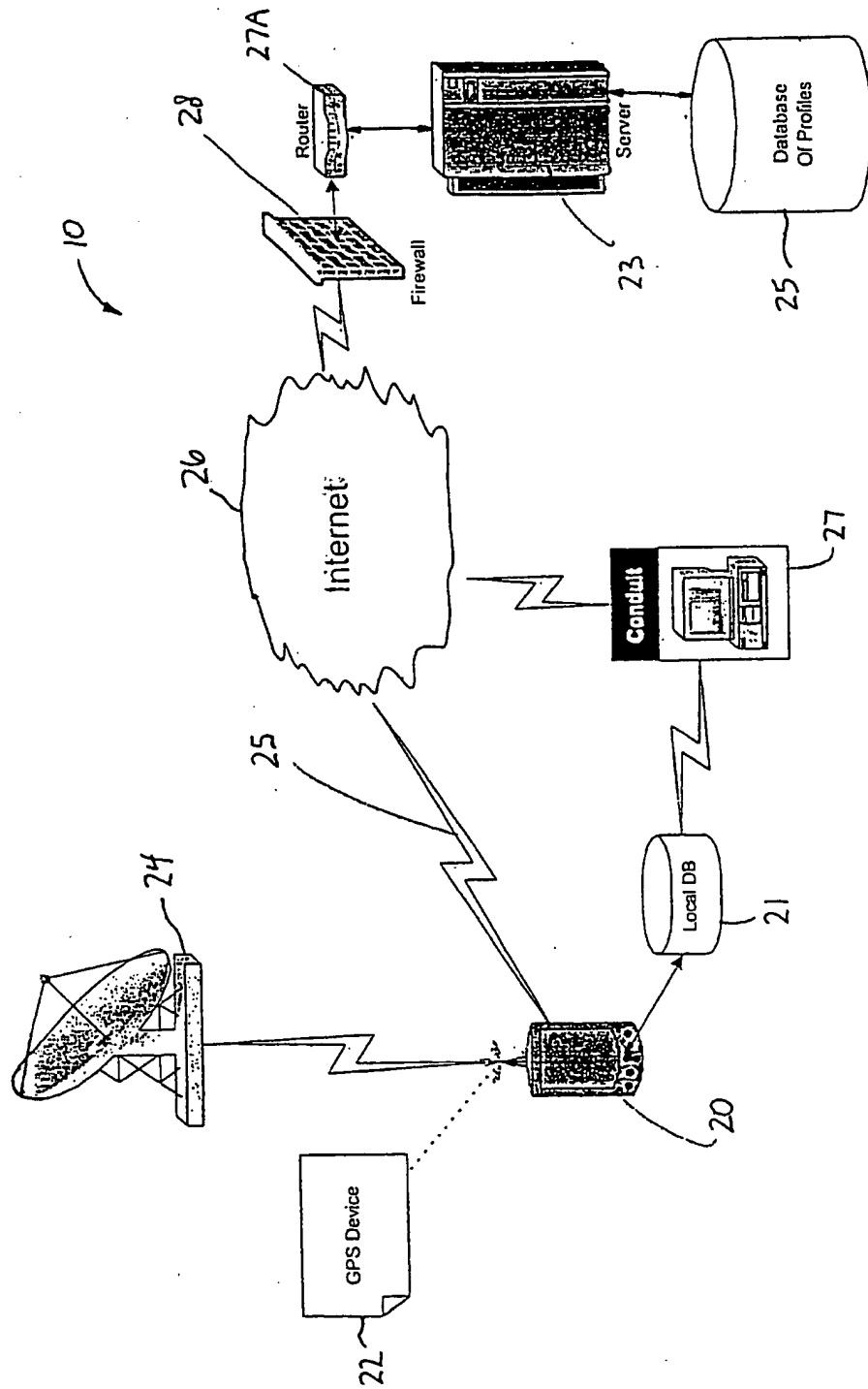


FIG. 1

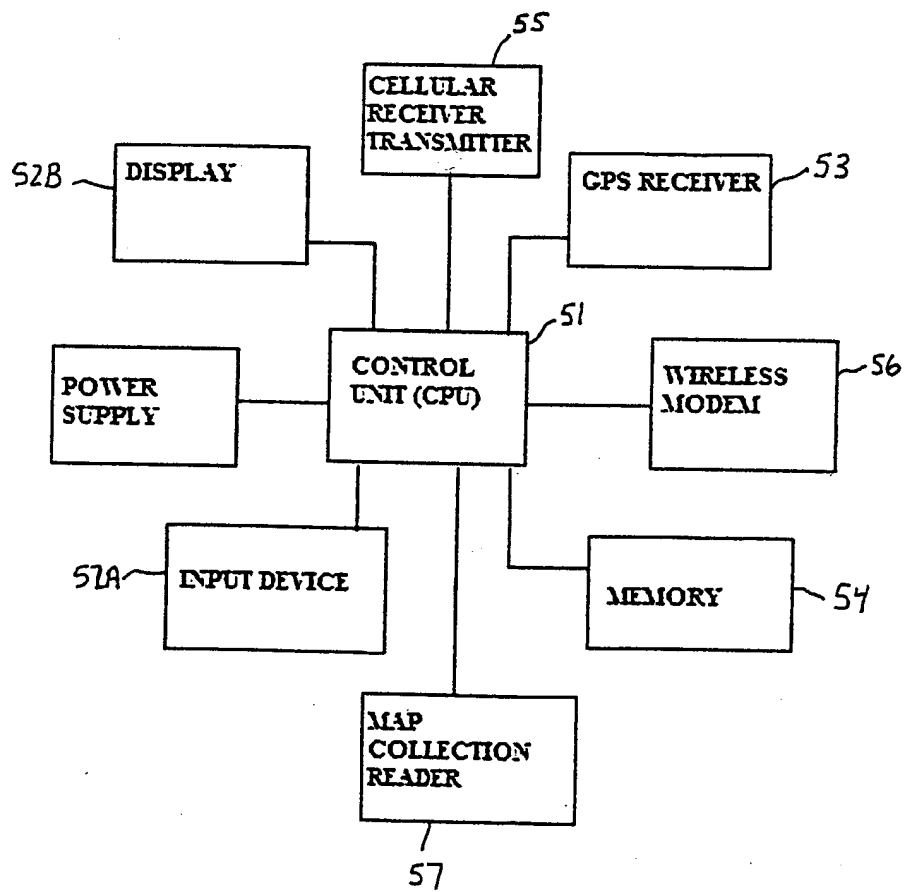


FIG. 2

RESTAURANT PREFERENCE

Restaurant style	Mexican
Distance	Within 10 miles
When	Weekends only
Price	Entrees under \$10-\$12
Particular items	Chimichangas

FIG. 3

BILL'S PREFERENCE PROFILE

Activity	Interest	Distance	Time
Hanggliding		20 miles	Any
	Antique Glass	5 miles	Any
Golf		7 miles	6 a.m to 8 p.m.
Skiing		60 miles	Off
	Food:German	10 miles	6 p.m. to 8 p.m.
Outdoor Symphony		15 miles	Any
Bowling		1 mile	Off

FIG. 4A

ALICE'S ATTIC PROFILE

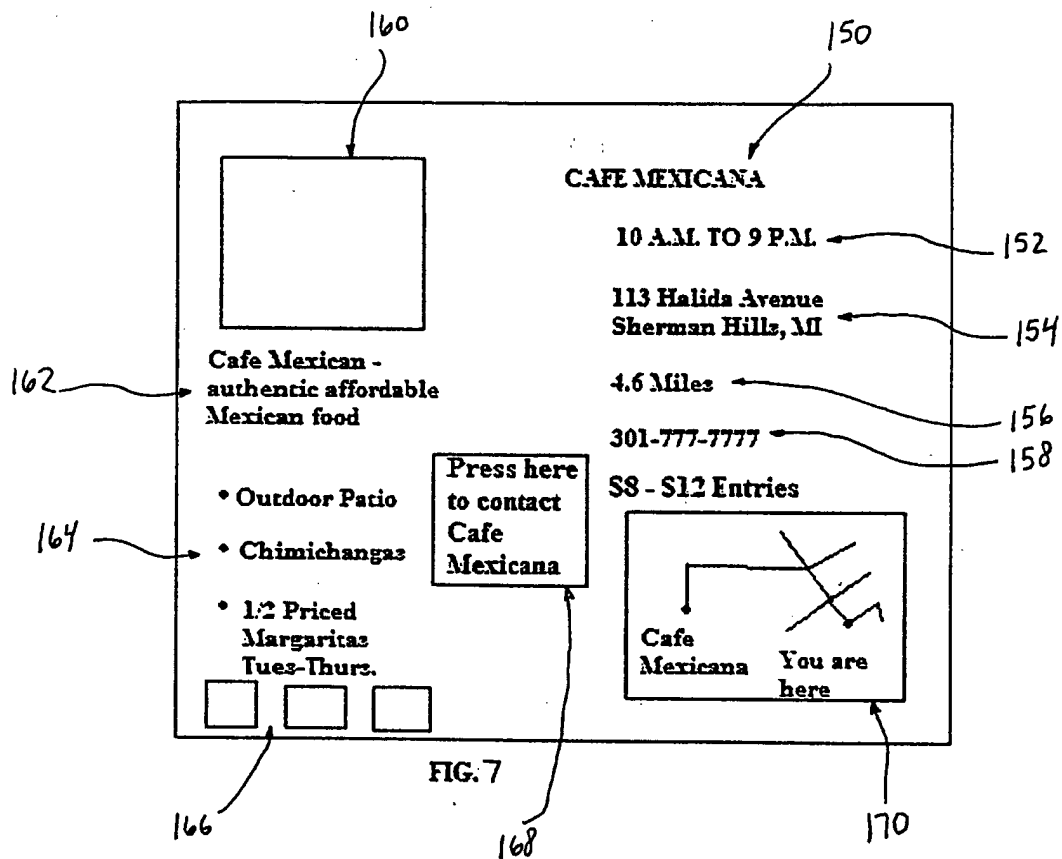
Activity	Interest	Goods	Specialty
		Antiques	Dolls
		Antiques	Porcelain
		Antiques	Glass
		Antiques	Tapestry

FIG. 4B

REAL ESTATE PROFILE

Price Range	\$200,000 - \$250,000
No. Bedrooms	3
No. Baths	2
Location	Within 10 miles of a train station

FIG. 5



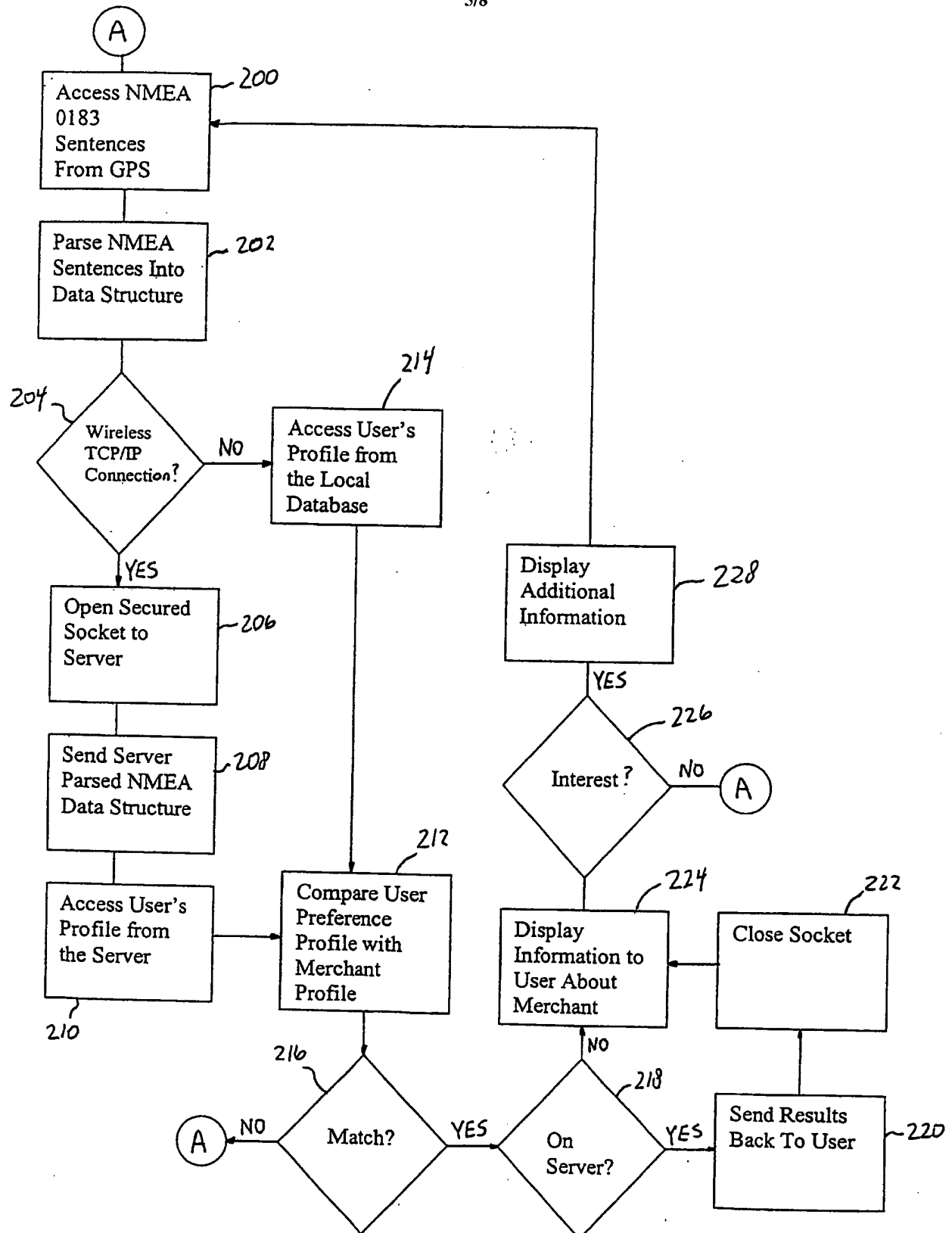


FIG. 8

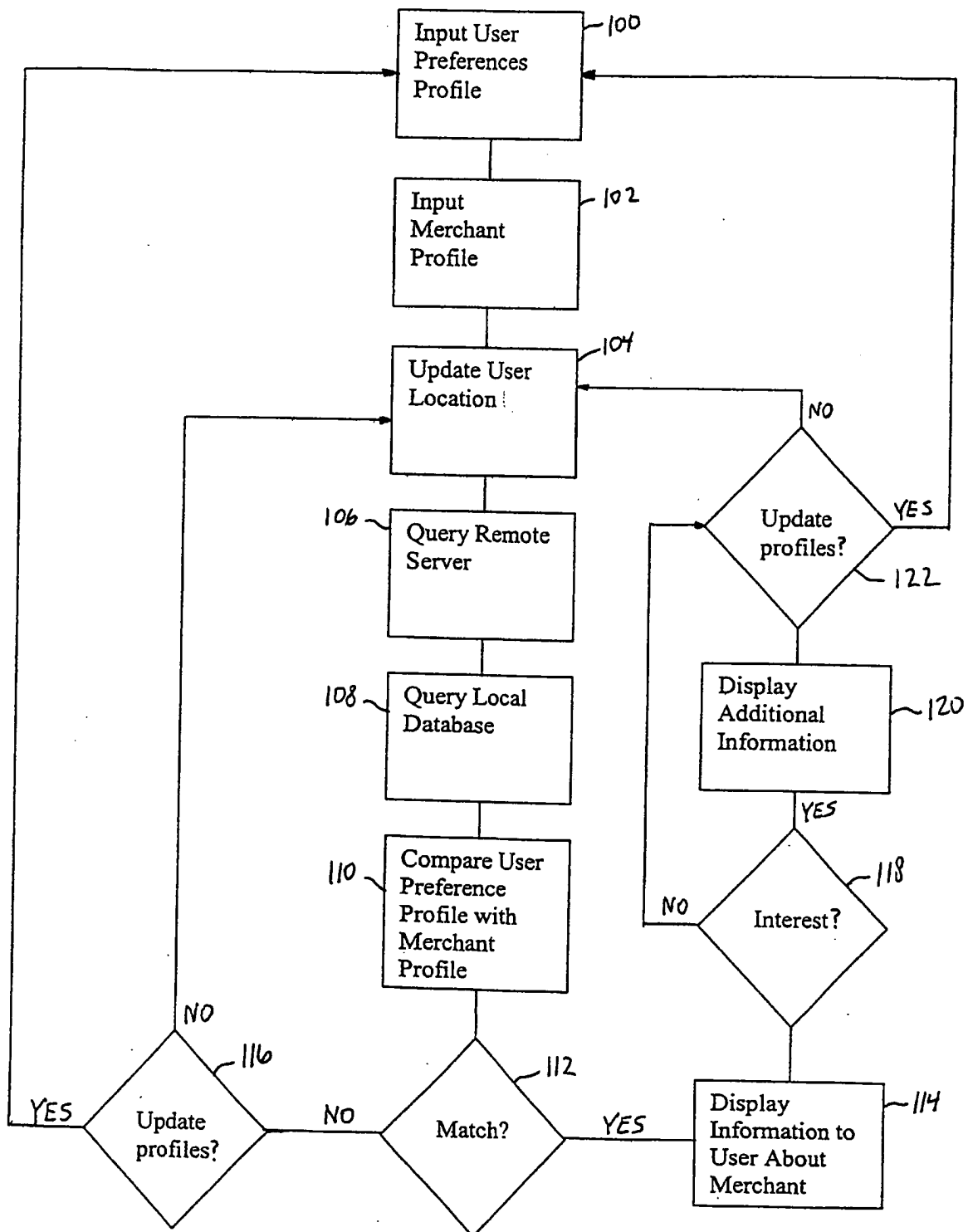


FIG. 6

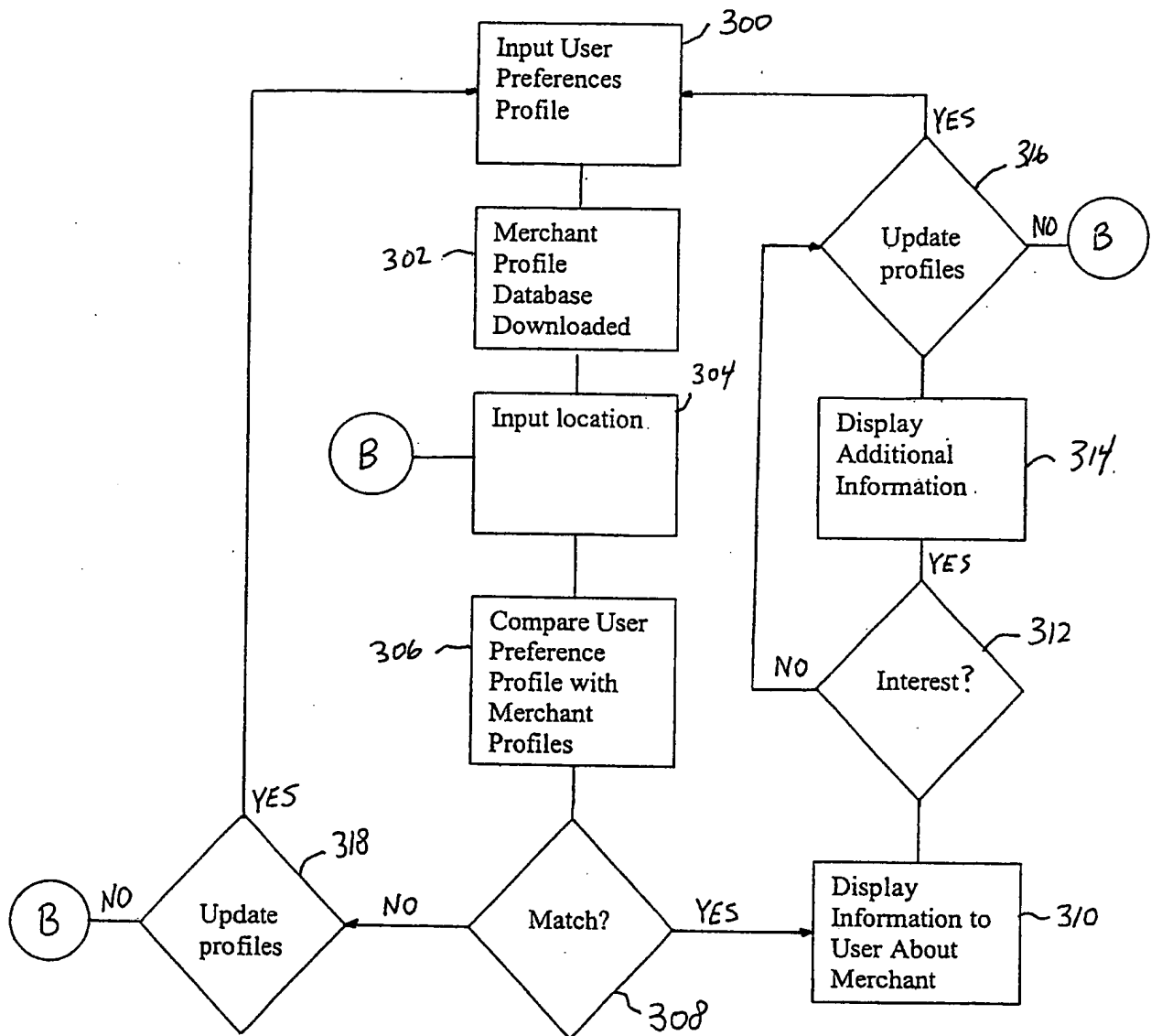


FIG. 9

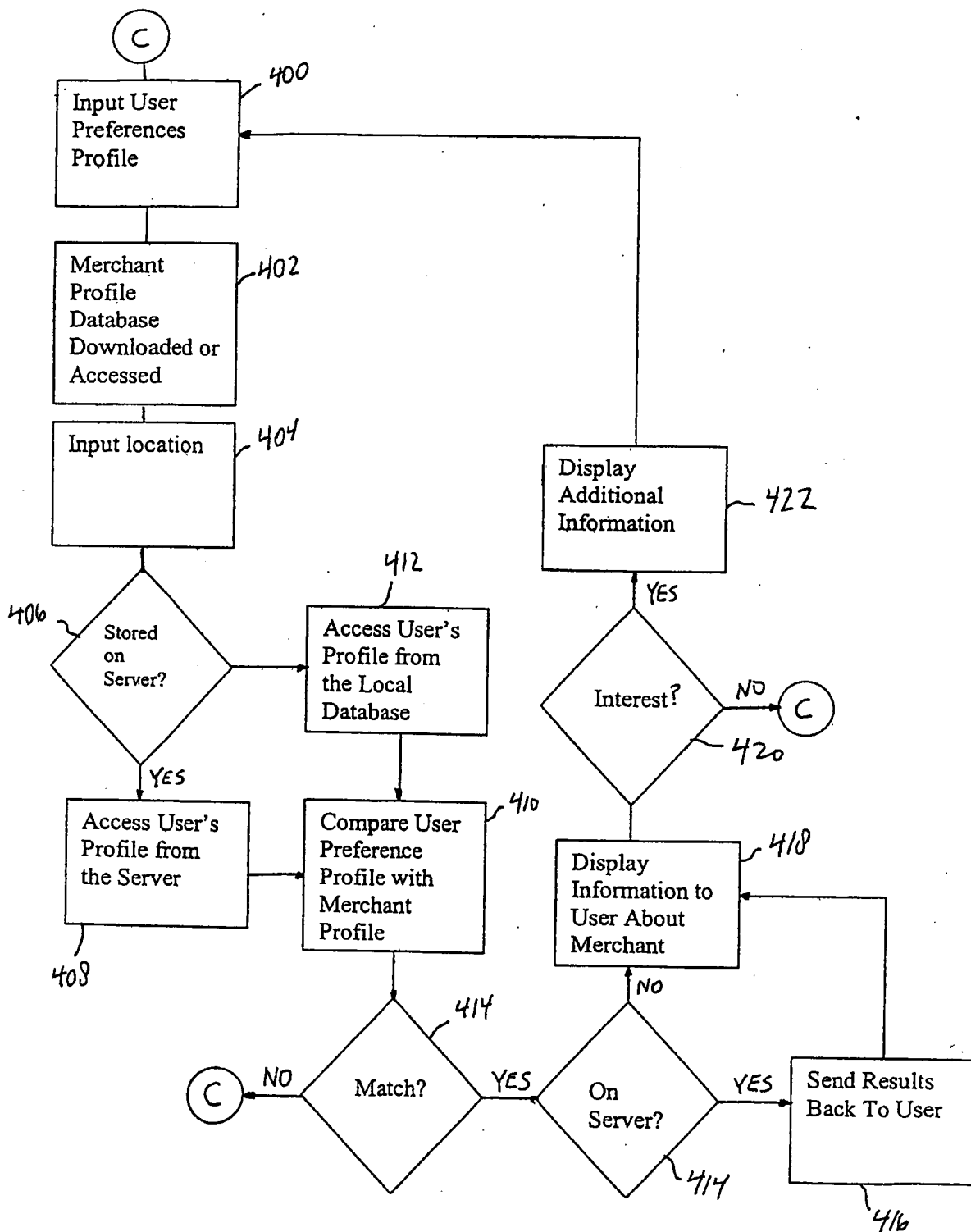


FIG. 10